CHAPTER 1

Managing the Mood in Your Contact Center

How to Lift Morale

THE DIFFERENCE BETWEEN MORALE AND MOTIVATION

In contact centers where morale is high, employees approach their work with energy, enthusiasm, and willingness. They want to come to work, or at least are enthusiastic about work once they get there. On the other hand, when morale is low in a contact center, employees can become bored, discouraged, and lethargic.

Motivation, on the other hand, refers to employees’ drive to get the job done. Highly motivated employees tend to be high producers, but that doesn’t necessarily mean their morale is high. In fact, contact center employees are often motivated by “negative incentives” such as a fear of losing their job, an excessive need for rewards, or an overly competitive need to outperform a colleague. Although these tendencies often result in an employee getting a lot of work done—and can even result in highly creative or innovative output—they diminish the overall health and morale of the team or the organization.

Two Good Ideas

One client has created a chief morale officer who monitors the pulse of the reps on the contact floor. When morale gets low, the morale officer distributes balloons or motivational stories or highlights a rep’s inspirational behavior. As a consequence the contact center enjoys low turnover and a productive working environment. Another company regularly surveys its employees to get their opinions on the current “temperature” of the team and solicits ways to help increase morale.
How to Motivate Contact Center Agents

Although morale and motivation are different things, they tend to work together in a continuous cycle. When morale is high, it's common to see that a high percentage of the employees are naturally more motivated to work hard. When morale gets low—and employees become less self-motivated—managers often resort to unpleasant, heavy-handed motivational tactics (such as nagging, threatening, making more rules, micromanaging, etc.), which in turn lower morale even further.

"The whippings will continue until morale improves."
—Anonymous

Understanding morale and motivation is vital to creating a high-performance center. Not surprisingly, we've found that the best results come when a center has both high morale and high motivation. There are two things we want to point out about raising morale:

1. It's not all fun and games.
2. Occasionally, you need fun and games.

Figure 1-1 shows what we mean. We've seen all four of these zones in contact centers and we've seen agents move between them with almost alarming agility. The ideal, of course, is to get your agents into the Efficiency Zone and keep them there. Throughout the rest of this chapter, when we refer to morale we mean this magical combination of morale and motivation that only exists in the Efficiency Zone.

Here's What We Know:
- The manager sets the tone for the entire department.
- Morale is contagious.
- Different things motivate different people.
- Environmental conditions affect morale.
- Motivations change.
- There's no magic formula or 100 percent guaranteed approach to creating high morale.
- Maintaining high morale is as much about caring as it is about caution.
- When employees' needs are met, they tend to be willing to do what you ask—and more.
- Increasing morale makes good business sense.
WHY IS MORALE SO IMPORTANT?

It's not impossible to have high productivity and decent bottom-line results in an environment where morale is low, but it is unlikely. As you'll see throughout this book, our approach is that you should care about how your employees feel, if for no other reason than because it's the right thing to do. But if you're not yet a convert to that way of thinking and that style of management, we've got some other good reasons for you to care about morale.

High morale in a contact center environment can lead to:

- Increased job satisfaction
- Lower turnover rates
- Higher productivity
- Reduced absenteeism
- Higher ownership of customer concerns
- Less job-related stress
- Increased identification with the company's mission
- Higher customer satisfaction
- Increased customer loyalty
- Strong “ambassadorship” (for example, through referrals) from your employees to their family, friends, and acquaintances

It's good for you, it's good for them, it's good for the bottom line. In a survey conducted by David H. Maister, the author of Practice What You Preach (Free Press, 2001), it was found that happy divisions outperformed unhappy ones by as much as 42 percent. What's more, just think of all the time, effort, and expense of hiring and training new employees that could be saved if you could just keep your current employees happy!

Here's a real-life example of how morale carries over to the bottom line:

A credit card firm had three contact centers in different parts of the country. Morale was generally high in two of the centers, but not in the third. This may or may not be attributable to the fact that in the third center the manager had held his position for more than 15 years, was close to retirement, and always acted from a “don’t rock the boat” mentality. Many of the agents in that center also had a long tenure (6 to 10 years versus 1 to 2 years for the other two centers) and couldn't see why they should do anything differently than the way it had always been done.

The company initiated a large campaign to turn the account reps into salespeople by having them “sell” balance transfers (i.e., transfer your debt from other credit cards to this one and get a low interest rate for six months) to customers. The two centers where morale was high outperformed the third one by some 34 percent.

You Know It When You See It

High morale doesn’t necessarily mean an absence of tensions, disagreements, or challenges. These are—and probably should be—present in any dynamic working environment. And it doesn't necessarily mean a complaint-free workplace. As we've all experienced at one time or another, complaints are often good ideas having a bad day.
However, when morale is high, the team invests its time and energy in finding solutions rather than creating problems. Employees show respect for one another even if they disagree. Despite the inevitable challenges of working life, in a high-morale environment employees take pride in what they do and as a result give their best effort. They go the extra mile for the team or for the customer. They look forward to coming to work and they attempt to make the workplace an enjoyable environment for themselves and others.

COMMON CAUSES OF LOW MORALE

Sometimes morale goes down temporarily and then naturally recovers. For example, after a major organizational change (such as layoffs or a downturn in sales), the resulting sadness and uncertainty can lead to a period of low morale. Once the remaining employees get their bearings, however, morale will often improve on its own.

But then there's the chronically low-morale workplace. Contact centers often find their way into this category. Whether a center handles sales, service, support, or all three, the job has some built-in difficulties that can adversely affect morale:

- Repetitious tasks
- Pressure to get through calls, e-mails, or chat sessions quickly
- Demanding or dissatisfied customers
- Agents' feeling of being tied to their workstation
- Fear or uncertainty

In some contact centers these challenges are compounded by additional factors such as:

- Little or no job security
- Lack of buy-in to the department or corporate mission
- Feeling of not being appreciated and/or valued by the organization
- Poorly designed working environment
- Sense of working a job rather than following a career path
- Lack of training
How to Motivate Contact Center Agents

- Not having the necessary information to do the job
- Faulty or wrong equipment

One of the most disappointing things we've seen in contact centers (and, making it even more disappointing, we've seen it repeatedly) is the case of the employee who is eager and willing to do a great job but is prohibited from doing so by mismanagement or wildly dysfunctional organizational policy.

TIP!

Pass along good news.

Develop a way to share news about good things that have happened to employees at work or outside of it. A continuous flow of good news will contribute to morale and will help to build a strong sense of community in the center. Here are a few options for passing the news along:

- Ask employees to report news to you so that you can send daily or weekly good news e-mails to your team.
- Create a bulletin board area where good news announcements are posted.
- Reserve a few minutes for good news to be shared at your regular staff meeting.

According to an article by Kenneth Kovach in Employment Relations Today,* when employees were asked in 1946, 1981, and 1995 what they valued most about their jobs, the top three things they reported were:

1. Interesting work
2. Full appreciation for the work they had done
3. A feeling of being in on things

If it's been that way for more than 50 years, there's a good chance it will stay that way in the future.

HOW TO MEASURE MORALE

There are two ways to assess the morale of your contact center team. The first is to observe the team members and the second is to ask them. Both practices are important and should be carried out on an ongoing basis. But there is an important difference between the two: your own subjective impressions will give you only half the story, while asking for input from your agents will give you valuable insight that you might not otherwise acquire (assuming, of course, that morale is sufficiently high to make agents feel comfortable telling the truth).

All around you are signs of your department’s current morale and omens of its future health. Your ability to intelligently read these indicators can only be sharpened by long-term experience as a concerned, reflective manager. For example, when the sales numbers are strong it often follows that morale is high. But it’s also possible that the sales numbers are high because the agents were recently warned that they would lose their jobs if they didn’t put up some higher numbers, in which case morale might actually be very low. (Again we see that morale and motivation often work independently of one another.)

When making your own assessment of your team’s morale, note whether or not your agents:

- Smile and laugh
- Strive to complete initiatives
- Think creatively and expansively
- Clearly enjoy what they’re doing
- Are more interested in their work than in distractions from it
- Do their work well
- Socialize with one another (go to lunch together, pop into their neighbor’s cubicle, etc.)
- Interact informally with their manager and supervisors

Those are some signs of high morale. Conversely, low morale is often indicated by the following employee behaviors:

- Being overly quiet or withdrawn
- Not socializing with coworkers
- Coming in late and/or going home early
- High turnover
Lackluster performance
Being easily distracted from their work

"‘So many managers believe that you can’t measure morale,’ say Jack Stack, CEO of Springfield ReManufacturing Corp. ‘That notion is not only wrong but dangerous. What gets measured gets done. If you don’t measure morale, you wind up taking it for granted.’"

In addition to honing your own perception skills, you might want to gather information from your agents through a survey designed to measure their satisfaction with the job, the organization, management, and so on.

**Employee Surveys**

There are a number of organizations that publish and score employee surveys and that can help you interpret and respond to the results. If you don’t feel ready for that or don’t have the budget, you might want to conduct an informal survey in which your agents complete a self-assessment of morale and job satisfaction.

A survey can be helpful in a number of ways:

- It asks for agents’ self-assessment—something you can’t get from your own observations.
- By asking reps to complete the survey, you’ll let them know that management is paying attention to issues of morale.
- It lets agents feel that they’re being heard and it tells them that their opinions are valuable to the organization.
- Just knowing that the organization is interested in what they have to say often helps employees to feel valued.
- It provides documented feedback that can be tracked against similar surveys in the future.

Here’s an example of how a satisfaction survey initiated a solution to an ongoing problem at one center:

A utility company in downtown Los Angeles conducted a satisfaction survey to see what the company could do to make the job bet-
ter for its agents. A high percentage of agents lived in outlying areas, had long commutes, and were often late to work. As a result of the survey, the agents came up with the idea of team job sharing. The team was responsible for having 80 percent of its members there on time with the rest coming in within the next hour. (Due to the variance in call volume, this was a workable solution for the center.) This allowed for flexibility in the team. If one person had a car problem or a sick child, for example, he or she could find another team member to cover for him or her. Attendance issues dropped.

The survey we use has not been scientifically designed or normed, but you might find it a helpful way to get some valuable feedback from your employees. Of course the survey should not be used as a substitute for actually talking to your reps on a regular basis to find out how they're feeling about their work and their workplace, but it can help you to gauge the morale of your team.

Keep in mind that the survey results will inform you of general patterns or trends—it shouldn't be relied upon for any scientific or legal data. Think of it as something akin to sitting around in a group and asking people to raise their hands in response to your questions. You'll get spontaneous, direct feedback about how your agents are feeling about a particular issue on a particular day at a particular time.

A reproducible copy of this survey can be found in the appendix.

**EMPLOYEE SATISFACTION SURVEY**

Please answer each question by circling the response that best describes how you feel about each aspect of your job.

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<tbody>
<tr>
<td>1. I have the tools, support, and resources I need to do my job well.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
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<td>2. Management values my contributions to the organization.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>3. I enjoy my work.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
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<tr>
<td>4. I feel a sense of camaraderie with the others in my work group.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
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<tr>
<td>5. I am rewarded when I do well.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
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<td>6</td>
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<tr>
<td>6. I am taught in a helpful and constructive way how I can improve at my job.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
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<tr>
<td>7. My manager and/or supervisor treats me with respect.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
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8. What would you change in order to improve the workplace and/or your job?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

9. In what ways do you hope to grow and learn in this job?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Creating Your Own Survey

You may want to try your hand at coming up with an informal survey that's customized to your unique work environment or to a particular area of concern. Another option is to create a few mini-surveys, each of which relates to a specific aspect of the agents' work life. For example, you might create one survey that assesses how agents feel about their day-to-day work activities, another that focuses on their feelings about the management and organization as a whole, and yet another that asks agents what incentives motivate them to perform well on the job. All three of these assessments will give you helpful feedback about the morale of your department.

If you want to create your own informal survey, our first suggestion is that you check with your legal department to find out if there are any constraints about the types of questions included on the survey. Following are a few additional guidelines for creating the survey:

- Phrase the statements positively.
  - *I feel valued* rather than *I feel underappreciated*
  - *I have the necessary resources to do my job* rather than *I do not have the necessary resources to do my job*
- Use a sliding scale with no exact middle.
  - *1 2 3* yields an overabundance of “2” ratings.
  - *1 2 3 4* forces respondents to lean either to the left or to the right of the exact middle.
Include some questions that ask for free-form comments. You’ll get feedback that’s much more telling than a rating of 1, 2, or 3.

Keep the survey short (fewer than 15 questions, including some that are free-form). Employees will be more apt to give the survey the time and thoughtfulness required if it’s relatively short.

Create questions that are simple, straightforward, and easy to interpret.

For example, if you were to ask, “How likely is it that you will be working for the organization two years from now?” you might get answers that really tell you nothing about an employee’s feeling of loyalty (maybe the employee knows that his or her spouse is going to be transferred to another city soon). A more direct question would be, “This organization deserves my loyalty.”

Don’t include questions about any subjects you’re not willing to address. Whenever you ask people what needs to be changed, it’s important that you be ready, willing, and able to make the changes (or at least to explain why the changes aren’t feasible).

Avoid asking agents to put their names on the survey. You’ll get more honest feedback by keeping it anonymous.

What to Do with the Results

Asking agents to complete the survey is only the first step. It’s equally important for you to actually do something with the results. Four steps are paramount:

1. Score the surveys and read the responses to the free-form questions.

2. Consolidate the responses and look for trends. For example, maybe the answers to many of the questions were all over the place but nearly everyone answered the question, “My contributions to the organization are valued by management,” with “strongly disagree.” This would seem to tell you that as a whole the group is feeling undervalued by management.

3. Determine what changes you will make to address problem areas. We recommend focusing on only one or two top-priority areas at a time. Once you’ve made some progress in those areas you can start working on others.

4. Share the results of the survey with your agents (so they know that the survey wasn’t done in vain) and tell them what plans you have to address the areas of low satisfaction.
Following is an example of how one contact center successfully assimilated and responded to the results of an informal employee satisfaction survey:

The customer service department at Light Bulb Electrics was suffering low morale largely because its people were kept in the dark about information relevant to their jobs and their industry. Customers would often know things about the company (such as price changes) before the customer service reps (CSRs) did, management would give CSRs shipping dates that had no chance of being met, and CSRs were losing business because requests for price quotes for custom orders would sit for several days on a manager’s desk.

At the suggestion of a consultant, the company agreed to conduct an employee survey as part of an initiative to improve morale and performance. Once the results had been reviewed by management, the customer service manager took the CSRs off the phones in two groups and brought in a pizza lunch. She listed on a flip chart the numerical results of the survey as well as the most common concerns raised by the CSRs. The marketing manager came in to explain that the reason the CSRs couldn’t give accurate delivery dates was because the company’s vendors were promising dates that the vendors couldn’t meet due to a shortage of materials in the plastics industry. Once the CSRs realized that management was not intentionally lying to them and that the competition was undoubtedly in the same spot, they felt better.

To solve the problem of being left in the dark about price changes, the marketing manager added the customer service manager to a routing list for some in-house mailings so that the customer service manager would know what was going on and could share the appropriate information with the CSRs.

To address the issue of price requests sitting on a manager’s desk, the group created a new position to handle just those quotes. Turnaround time for the quotes shrank from 3 to 4 days to 8 to 12 hours.

Through the skillful use of an employee survey, what started as a volley of gripes eventually became a series of meaningful, effective changes that helped improve productivity, customer satisfaction, and morale.

**How Often Should You Do Surveys?**

It’s hard to create a general rule about how often to conduct employee satisfaction surveys. In some environments—ones that have a relatively stable climate and low employee turnover—one a year might be a good interval. In more volatile environments—for example, a
center with high turnover and ongoing change—it would be advisable to conduct the survey every four to six months. Once the results start coming back with consistently high scores, the manager could start doing the surveys every year or so.

HOW DO YOU IMPROVE MORALE?

To some extent, this whole book is meant to answer the question of how to improve morale in a contact center. Good coaching practices, team building, stress relief, a sense of mission, and many other topics covered in this book will go a long way toward achieving and maintaining high morale. But since those subjects are treated at length in their own chapters, we’ll focus here on a few of the more immediate measures you can take when you notice morale is heading south.

It’s easy to make the assumption that the key to morale is simply to give the agents what they want. But that isn’t always the case. What they want—or think they want—may be minimal work, lots of play, and plenty of pay. But we’ve found in a number of centers that what really makes employees thrive is a dynamic, positive environment in which agents are continually learning and their performance is continually improving. So, how do you make this happen? Good question!

It’s important for you as the manager to create and continually foster a climate of enthusiasm, open communication, and active participation. It’s in this kind of environment that agents will be productive and committed to your goals. You’ll find that a little goes a long way: if employees see you—and the organization as a whole—making an effort to meet their needs and to treat them well, they’ll be inclined to give you their best efforts.

On the other hand, if you create a climate of mistrust and uncertainty, your agents will tend to do just enough to get by. And they’ll probably only do that until it becomes more appealing to get by at some other company. Of course, in almost every organization there are some “get by” people who will always be “get by” people no matter what you do to encourage, inspire, motivate, and transform them. If you’re serious about improving the morale of your team, the time may come when you need to give stern warnings to those agents whose attitude is weighing down the morale of the group. Then, if they continue to create problems, it may be best to terminate them.

There are a number of important measures you can take to boost the morale of your team. Let’s start by looking at Table 1-1, which details what you can do to address the previously mentioned difficulties inherent in a contact center.
### How to Motivate Contact Center Agents

#### TABLE 1-1 Solutions to Common Morale Problems

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<th>PROBLEM</th>
<th>SOLUTION</th>
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| Repetitious tasks                      | • Give agents regular breaks from calls or keyboard work.  
• Let agents rotate on and off multiple projects (for example, different clients at an outsourcer) or work in a shared environment (answering the phone for different accounts/projects).  
• Use the stress-relief techniques outlined in Chapter 5. |
| Pressure to get through calls, e-mails, or chat sessions quickly | • Coach agents to skillfully shorten call length.  
• Slow down the predictive dialer or give agents occasional breaks between contacts so they can stretch and catch their breath. |
| Demanding or dissatisfied customers    | • Train agents to skillfully handle challenging customers.  
• Rotate agents to other jobs every few hours or days so they can talk to some nice folks for a change. |
| Feeling of being tied to workstation  | • Have one rep (or more as needed) rotate on the floor to cover people who need a break.  
• In addition to two 15-minute breaks, give people an additional 10–15 minutes a week when they can be logged off but not have to say why.  
• Let agents stand up while working.  
• Explain the productivity standards and ask reps for suggestions on how they can meet them and not be tied to their workstations. |
| Little or no job security              | • Give agents more security by putting them on a career path.  
• Help agents plan ahead (for example, if you know a project is going to be ending in a month, let them know). |
| Lack of buy-in to the department or corporate mission | • Remind agents—or tell them for the first time—what’s in it for them.  
• Translate the mission into one or more specific benefits for the employees.  
• Make sure agents don’t feel that they’re working hard just to let upper management get rich, etc. |
| Feeling of not being appreciated or valued by the organization | • Tell your agents—sincerely, powerfully, and continuously—that their efforts are highly valued by you and your organization.  
• Give agents frequent coaching with lots of praise.  
• Bring in senior managers for lunch once a quarter for a company update and Q&A session.  
• Walk around the work floor on a regular basis, talking to agents and asking how the job is going, what the customers are saying, what you can do to make their job easier, etc. |
| Sense of working a job rather than following a career path | • Let agents know what opportunities are available to them down the line.  
• Show agents how their work brings value to customers’ personal or professional lives. |
To remind agents of the importance of high morale and motivation (M&M) when serving customers, make m&m's™ candies the official sugar fix of your department. You can hand out any or all of the five varieties from time to time or keep a stock on hand for morale and motivation emergencies. Here are a couple of other M&M ideas: managers can schedule M&M time, in which they sit in a quiet place eating m&m’s and think about what they can do to improve morale and motivation. When the candies are gone, they go back to work and implement their ideas. Alternatively, managers can invite a peer to help brainstorm ideas (and help finish the bag).

The following list contains some additional tips to help you maintain high morale in your own environment. Make an effort to follow through with these tips on a consistent basis, and we’re sure you’ll see encouraging results.

**Contact Center Manager’s Checklist: How to Boost Employee Morale and Motivation.**

- Emphasize the positive: what went right, what can be done instead of what cannot, what’s going well, and so on.
- Reward agents for exceeding expectations.
- Ask for agents’ input, and then use it.
- Hold agents accountable for their performance.
- Ask agents for their feedback on your performance and management style.
- Ask agents for their opinions and feelings on issues and decisions that impact the work environment.
- Offer a work schedule with as much flexibility as possible.
- Give agents all the information, tools, and resources they need to do a great job (with continuous updates).
- Regularly talk to employees about the overall mission of the business and how their efforts contribute to it.
- Provide regular and appropriate feedback on performance.
- Use proven, effective techniques for praising and correcting employee performance.
- Involve employees in decisions that affect their jobs.
How to Motivate Contact Center Agents

- Establish effective and user-friendly channels of communication.
- Treat your employees as adult professionals—at least until they give you reason not to.
- Tell the truth, but gently.
- Be very, very, very fair with your agents.
- Use “we” language.
- Always celebrate success.
- Acknowledge important moments and experiences in agents’ nonwork lives.

“Businesses with a high morale factor have a competitive edge over other businesses. It is not a superior product or service offering. Nor is it related to material things. It cannot be overcome with lower prices. It is an intangible feeling transmitted from each employee to every other employee and to the customer. It makes customers respond with repeat orders.”

—W.J. Ransom

**TIP!**

Although we strongly advocate face-to-face communication between managers and agents, there’s no harm in occasionally using technology to motivate your agents. Here are a few ideas:

- Send an upbeat Monday morning voice mail message to the entire team at the beginning of the workweek.
- When you notice an agent is having a particularly hard time, send a supportive message via e-mail.
- Pipe in upbeat music every so often. For example, Gateway Computers pipes in music the first thing in the morning and again late in the day. It can’t be so loud that the callers can hear it, but it could be in the background.
- If possible, have music on hold for the reps so they can listen while waiting for calls.
- Arrange for employees to get birthday cards and employment anniversary cards from the big boss (these should probably be personally delivered with a big thanks).
- Use electronic wallboards to communicate and to motivate your employees throughout the day.
If you want your agents to act and perform like professionals, it’s up to you to treat them that way. Among other things, this means continually sharing information with them and upgrading their own knowledge about your business, your customers, your industry, and so forth. Think about it: why should you be the only one in the department to read an article about your competitor’s customer service innovations or a report on future trends in your industry? There are, of course, times when it doesn’t make sense to treat your agents as colleagues. But there are also times when doing so can make them feel valued, important, and very grown up. In return you’ll get their enthusiastic behavior and strong performance.

There’s Always Something to Celebrate!

Find fun and creative ways to observe offbeat “holidays” such as Groundhog Day (February 2), Burundi’s Independence Day (July 1), or the anniversary of the invention of television (January 7, 1927) by wearing particular clothes, bringing in special food, or otherwise celebrating in a light-hearted and respectful way. If your own memory of these dates is a little rusty, a very helpful resource is Chase’s Calendar of Events (Contemporary Books; published annually), which lists more than 12,000 historical anniversaries, holidays, birthdays, and events.

ADDITIONAL RESOURCES

Books
How to Motivate Contact Center Agents


**Companies**


**Associations, Magazines, and Interesting Web Sites**

- [www.goalmanager.com](http://www.goalmanager.com). A human resources portal site offering resources for motivating staff.
- [www.chartcourse.com](http://www.chartcourse.com). A Web site with a host of resources available.
- [www.motivation123.com](http://www.motivation123.com). Tips and resources to help get and stay motivated.